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# Diversity Initiative



*March 06, 2008*

# Content

- The Face Of Our Landscape
- Psychographics
- Media Landscape
- Cases



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# The Changing Landscape

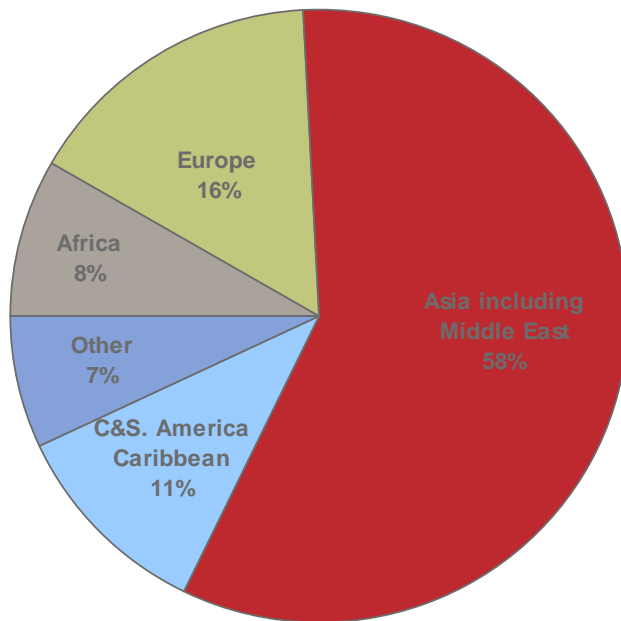
- Percentage of foreign born Canadians is rising
  - 18.4% in 2001 → 20% in 2006
- 2001 – 2017 will see up to 8.5 million immigrants
- Currently 70% of net labour force growth accounted by immigration
  - By 2011 → 100% of growth
- Toronto among the most immigrant-based cities in the world
  - Toronto 46%, Miami 40%, Vancouver 38%, Sydney 31%
  - In Toronto, 25% of school aged children are foreign born



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# Countries Of Origin Of New Immigrants



The Top countries of origin among recent immigrants to Canada are:

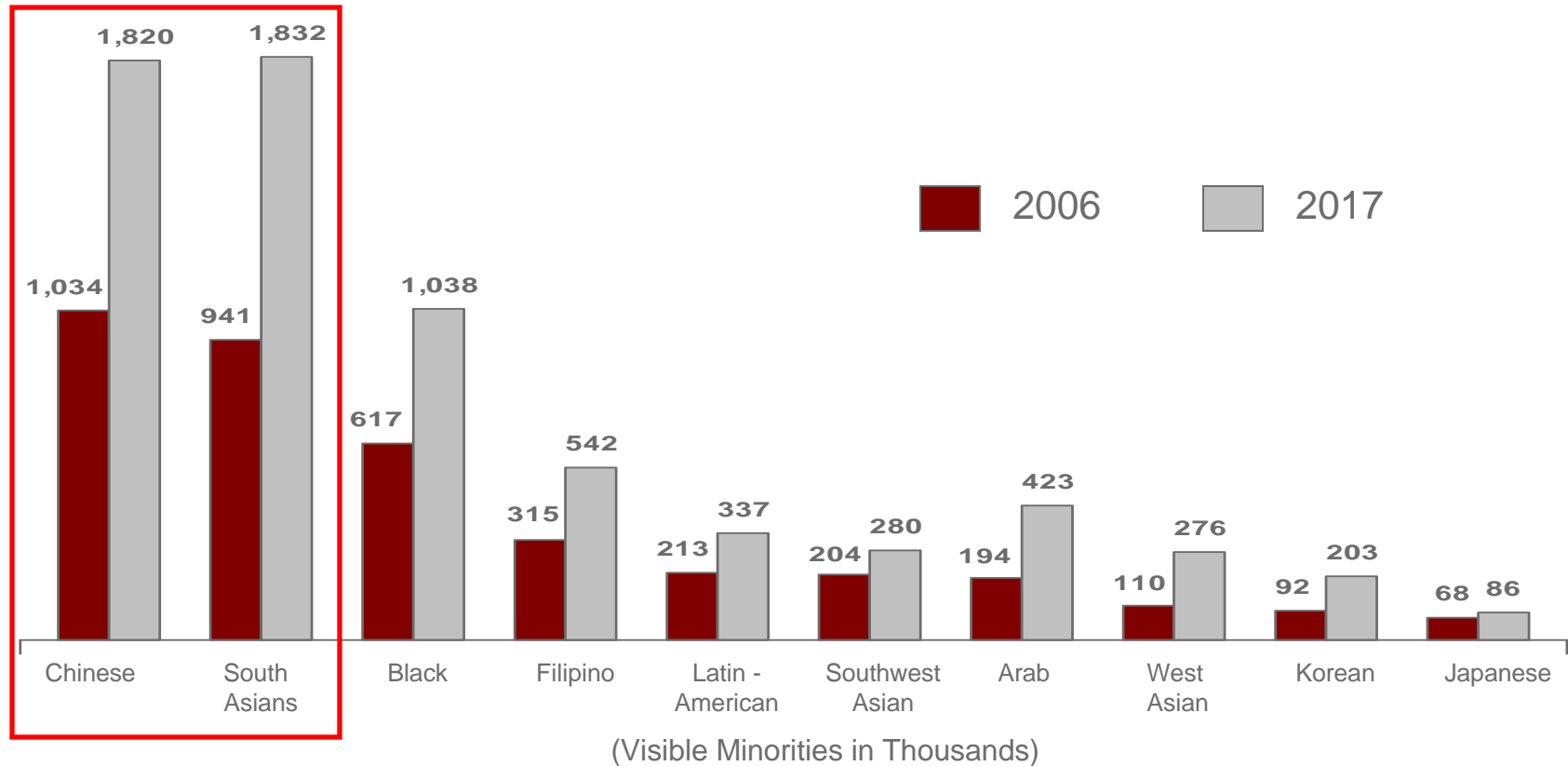
1. China
2. India
3. Philippines
4. Pakistan



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# Chinese And South Asians Remain The Largest Visible Minority Groups In Canada



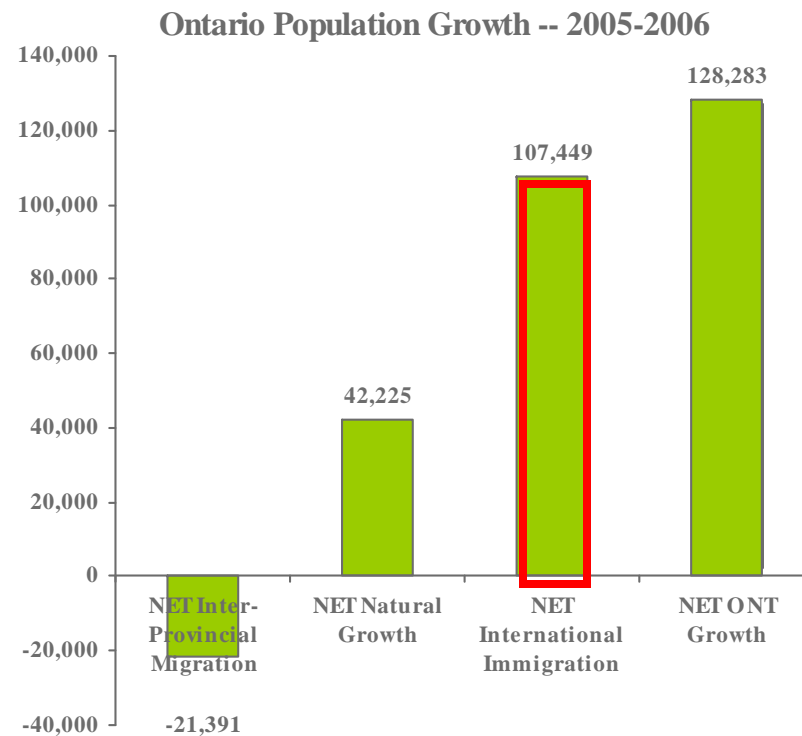
Source: Statistics Canada Census. 2006. Projections based on reference scenarios.



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# Immigration Is Primary Driver Of Population Growth In Ontario

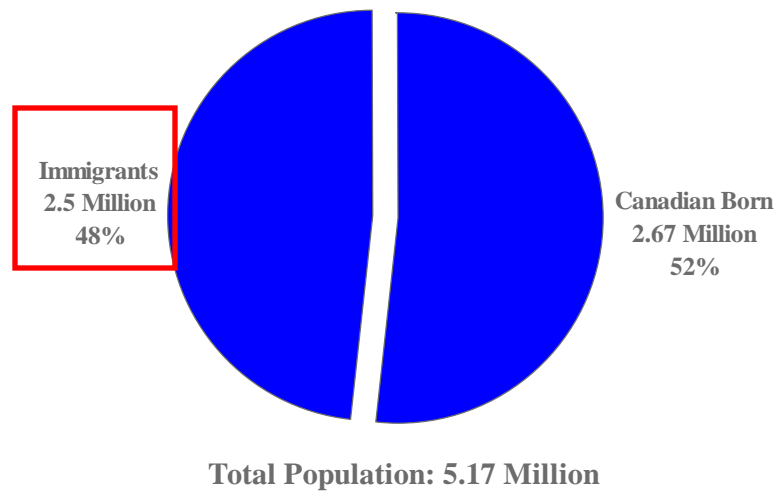


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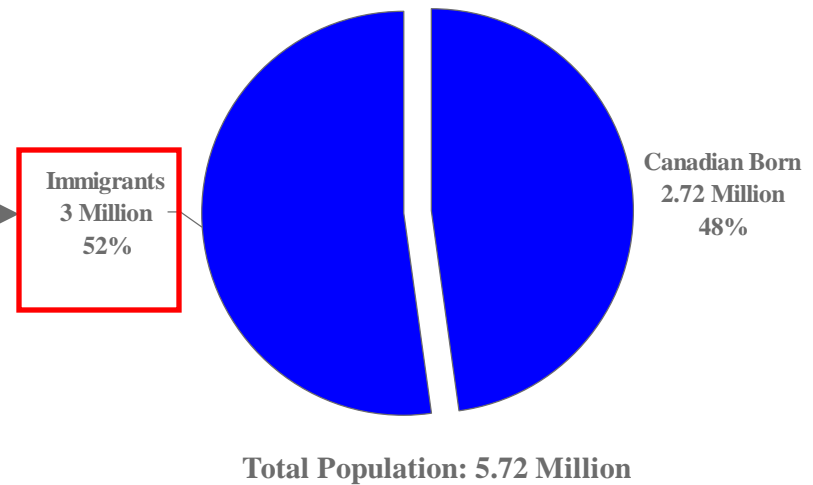


# In The GTA, The 'Visible Minority' Will Soon Be The 'Visible Majority' In Less Than 5 Years

GTA Population, 2006



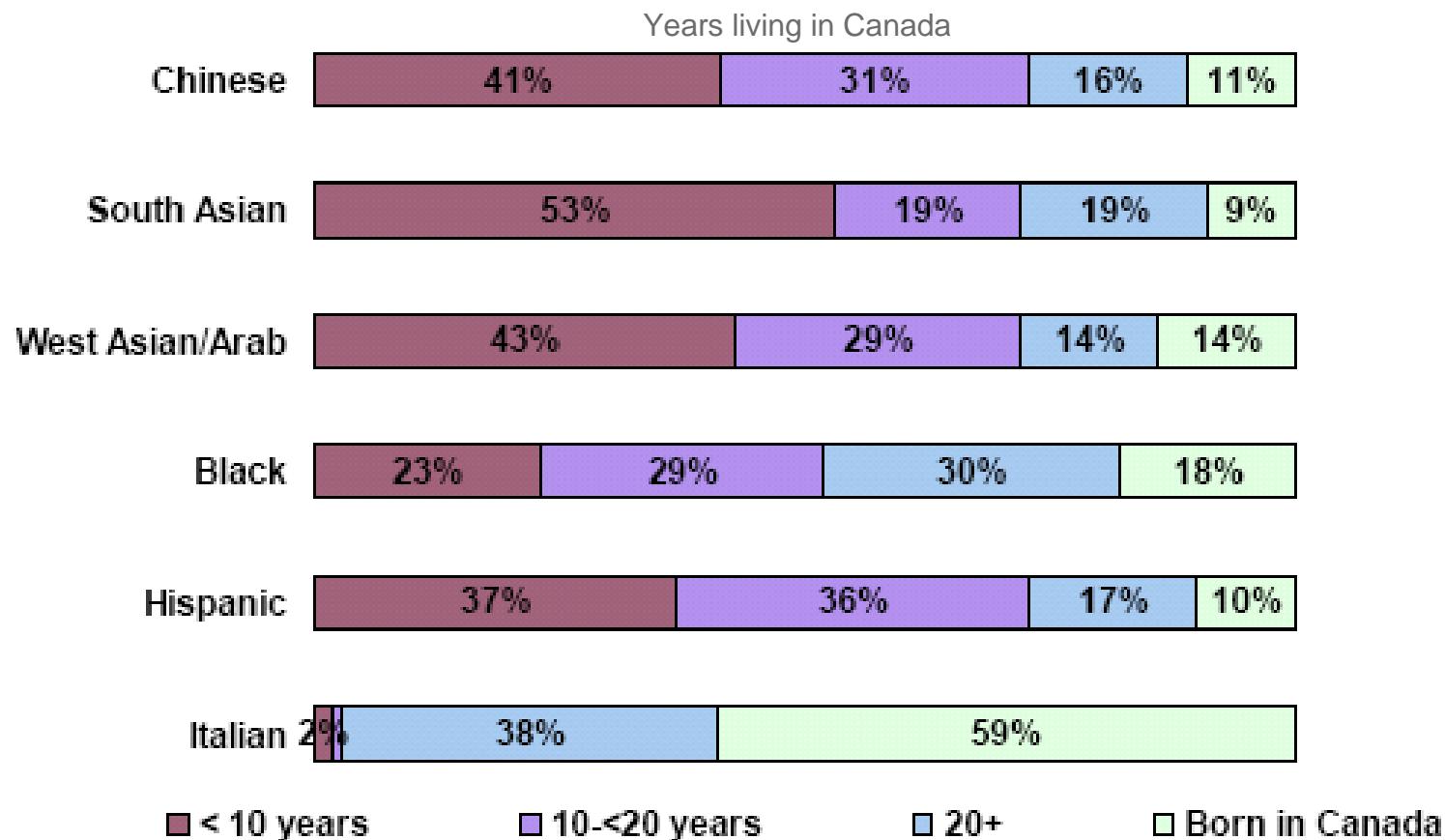
Projected GTA Population, 2011



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# Almost Half Of Chinese And Just Over Half Of South Asians Have Been In Canada For Less Than 10 Yrs.



Source: Diversity in Canada, Fast Forward Research, 2006



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# New Immigrants Are Significantly More Likely To Have More Children

% of families with children under 18yrs at home



Importance of family is very much in line with ethnic profile

Source: Diversity in Canada, Fast Forward Research, 2006



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## Are Educated And Twice As Likely To Hold A University Degree Than The Canadian Born Population

- > Over half (56%) of new immigrants hold a college / university degree

	Less than grade 9	Some high school	High school diploma	College or trade diploma	University degree	Total
Total						
Canadian-born	9%	25%	24%	29%	14%	100%
Immigrants	14%	18%	20%	27%	21%	100%
Immigrated before 1986	18%	17%	18%	30%	17%	100%
Immigrated 1986-1995	11%	20%	24%	25%	20%	100%
Immigrated 1996-2001	7%	17%	20%	20%	36%	100%

Source: Recent Immigrants in Metropolitan Areas, Statistics Canada Census. 2001

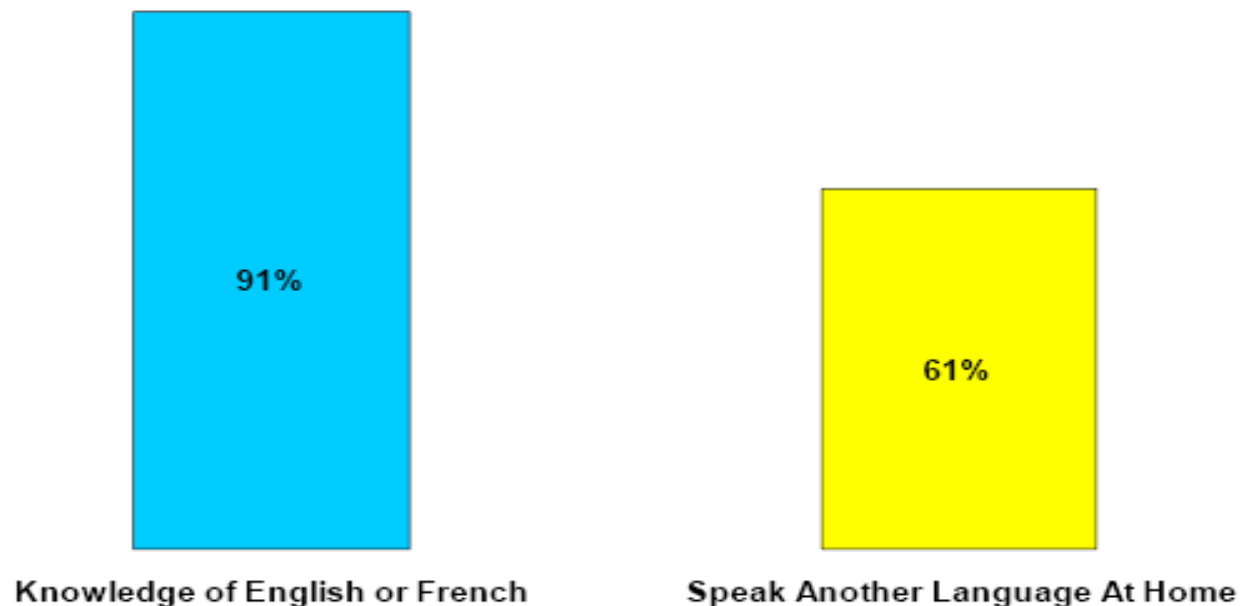


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# 9 Out 10 Recent Immigrants Speak A Non-Official Language And Almost 2/3 Speak It At Home

1990s immigrants – proportion speaking a non-official language at Home, Canada, 2001



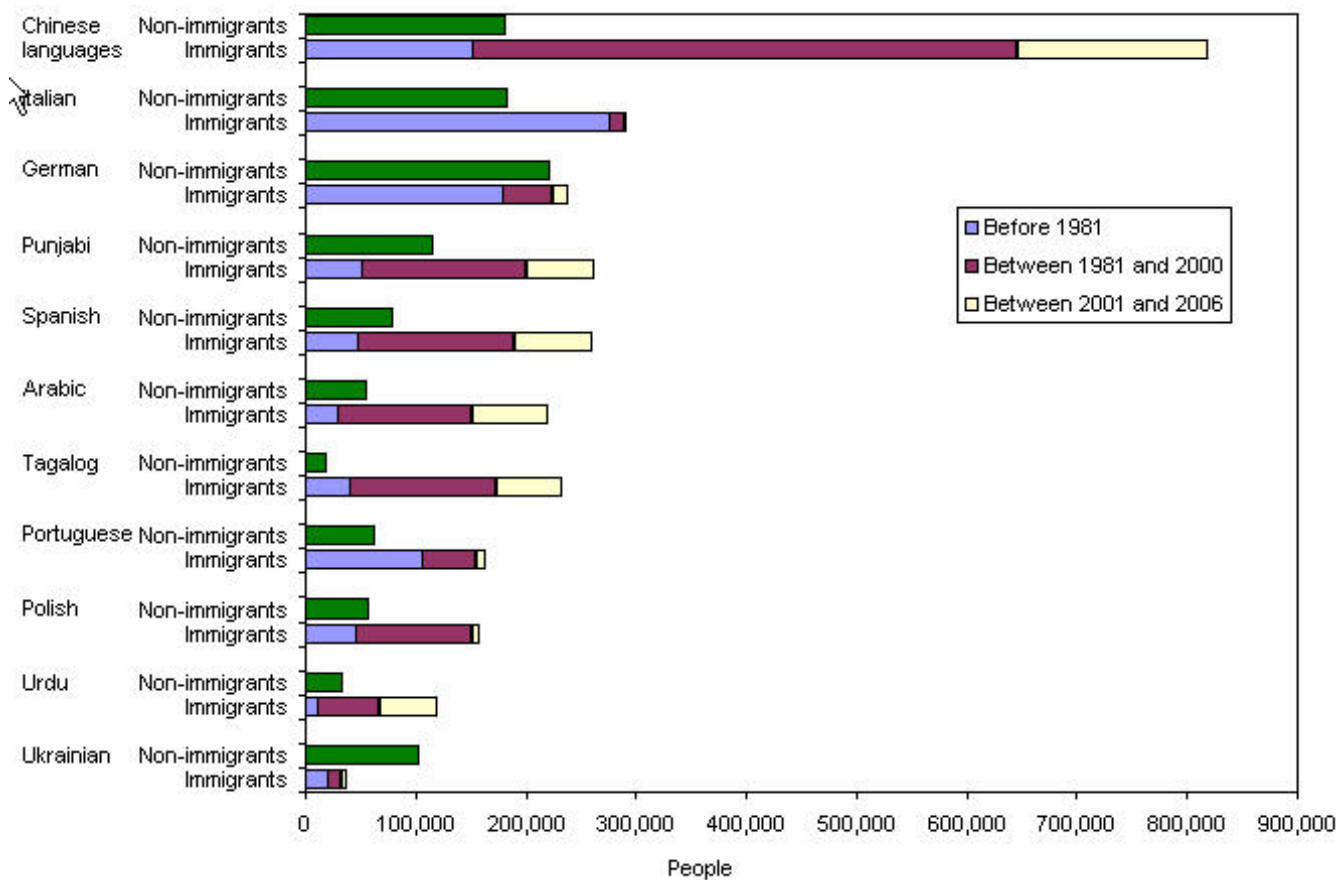
Source: Statistics Canada, 2001 \*Source: Longitudinal Survey of Immigrants to Canada.



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# Top 10 Non-Official Mother Tongues



Source: Statistics Canada, Census of Population, 2006.



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# Languages Spoken At Home (Chinese & South Asians)

	Toronto CMA
<b>SOUTH ASIAN</b>	
Population age 18 years and over	377,914
<b>Language Spoken Most Often At Home</b>	
English	116,519
Hindi	17,301
Punjabi	78,070
Urdu	36,788
Other	129,236
<b>CHINESE</b>	
Population age 18 years and over	331,279
<b>Language Spoken Most Often At Home</b>	
English	42,389
Cantonese	107,217
Mandarin and other Chinese dialects	161,983
Other	19,690

Importance of communication in-language



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# Psychographics



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# Understanding Cultural Drivers

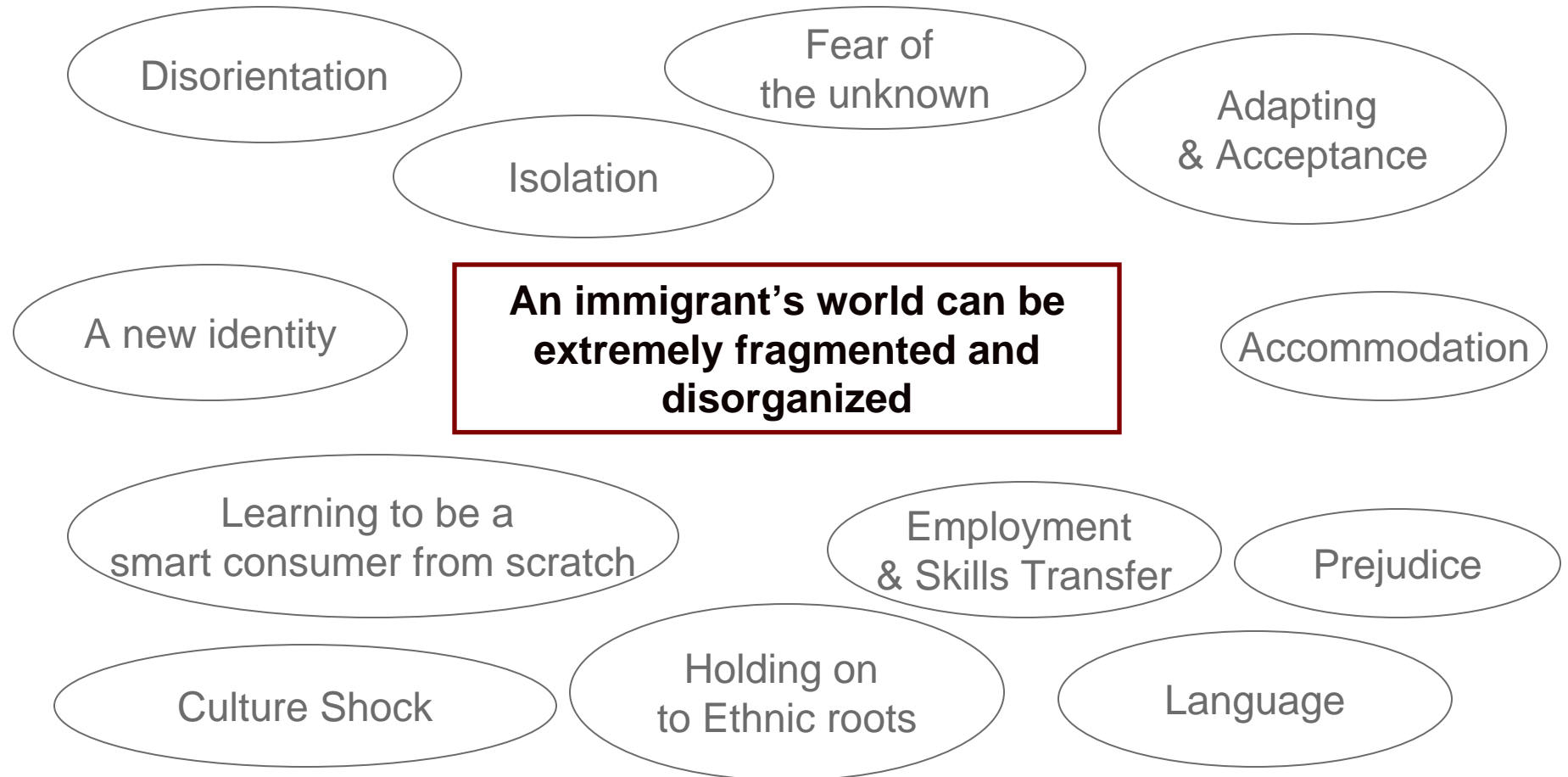
- It is more than demographics and ethnicity
- It's cultural
  - Cultural norms: Behaviour
  - Education: Importance and level
  - Economic: Financial position
  - Symbolism: Meaning of objects, events or relationships
  - Social: Interactions
  - Political: Attitudes toward government
  - Religious: Beliefs that guide actions and attitudes
  - Historical: Events that impact attitudes and actions



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# Likely State Of Mind Of Immigrants



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# Ethnic Consumers – Some Insights

<u>Chinese</u>	<u>South Asian</u>
<b><i>Cantonese</i></b> <ul style="list-style-type: none"><li>▪ Style conscious</li><li>▪ Educated</li><li>▪ Family oriented</li><li>▪ Entrepreneurial</li><li>▪ Location: Markham, Richmond Hill</li></ul>	<i>Languages: Punjabi, Urdu, Tamil, Gujarati, Hindi...</i> <ul style="list-style-type: none"><li>▪ Value conscious</li><li>▪ Educated</li><li>▪ Family oriented</li><li>▪ White collar/Small Business</li><li>▪ Location: Mississauga, Brampton, Scarborough, Etobicoke, North York</li></ul>
<b><i>Mandarin</i></b> <ul style="list-style-type: none"><li>▪ Value conscious</li><li>▪ Educated</li><li>▪ Family oriented</li><li>▪ White collar</li><li>▪ Location: Scarborough, North York, Downtown</li></ul>	



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# Research Sources/Applications

- Client research
- Lexis-Nexis – Published information
- WARC
- EuroMonitor
- Syndicated research
  - PMB
  - ACNielsen
  - Economic Research Council of Canada
- Environics/Manifold
- Solutions Research Group; Leger Marketing, etc.
- Publicis Context Analysis, Knowledge Group & Streetviews
  - Online Diaries & Panels
  - Opinion Leader Interviews
- ZenithOptimedia Touchpoints



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# Media Landscape



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# How Can We Best Reach Them?

- Connect with the ethnic community through...
  - Targeted communications and in-language, where they believe “*you are talking to them*”
  - In media that reaches them best:

<u>Adults</u>	<u>Youth</u>
<ul style="list-style-type: none"><li>■ Print</li><li>■ TV</li><li>■ Radio</li><li>■ Community centre, Grocery stores, Places of worship</li><li>■ Events</li></ul>	<ul style="list-style-type: none"><li>■ Print – Youth magazines/section</li><li>■ TV</li><li>■ Radio</li><li>■ On Line</li><li>■ Cinema</li><li>■ Malls</li><li>■ Events</li></ul>



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# Media Habits

- Chinese and South Asians are heavy consumers of in-language media
- 75% of Chinese and South Asians 15+ have used at least one ethnic Radio/TV station or newspaper in the last 7 days
- Only 50% of Chinese and 57% of South Asians are reached by English language newspapers
- 88% use the Internet (slightly above market benchmark), and average time spent per day is 1.8 hours (market benchmark – 1.7 hours)
- 80% of Chinese use Internet at home (market average 68%)

*Source: Solutions Research Group – Media habits*



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# Television In Canada

## ■ Television

- There are 4 major television stations/networks in Canada that are dedicated to full time Ethnic Groups in their languages;

- APTN                      Aboriginal
- Fairchild                Cantonese & Mandarin
- Telelatino               Italian & Spanish
- Vision TV                Arabic, South Asian



- There are 12 major television stations/networks in Canada that carry part-time coverage of various ethnic groups;

- CHEX, CHFD, CHIN-TV, CHMI, CHMN, CJNT
- CKAL, CKEM, Omni 1, Omni 2, Punjabi World TV, TV Deutsch



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# Television in Canada

- Over and above the full and part time ethnic stations approximately 25 digital stations offer an even greater variety of cultural programming.

• Abu Dhabi	- Arabic	Mabuhay Channel	- Tagalog
• All TV	- Korean	Odyssey	- Greek
• Alpha Punjabi	- Punjabi	Persian Vision	- Persian
• ART America	- Arabic	RTVI	- Russian
• ART Digital	- Urdu	SBTN	- Vietnamese
• B4U Hindi Movies-	South Asian	SSTV	- South Asian
• Centre TV	- Russian	Talent Vision	- Mandarin
• FPTV	- Portuguese	Tamil TV	- Tamil
• GTV	- German	Tamil Vision	- Tamil
• Inter TV	- Ukrainian	WMNB	- Russian
• TVP Polonia	- Polish	TV Japan	- Japanese
• Fairchild HDTV	- Cantonese & Mandarin		



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# Radio In Canada

## ■ Radio

- There are over 47 radio stations that program a portion of their airtime to ethnic communities.
- The 47 stations cover over 70 different ethnic groups.
- The largest stations are;
  - Toronto
    - CHIN AM & FM
  - Edmonton & Calgary
    - Fairchild
  - Vancouver
    - CJVB AM
  - Montreal
    - CFMB AM



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# Print In Canada

- Newspaper & Magazines
  - There are over 195 newspapers and magazines printed for 44 different cultural groups in Canada.
  - Daily newspaper are available in many languages;
    - Chinese (5)
    - Italian (1)
    - Korean (1)
    - Spanish (1)
  - Other papers are published weekly, bi-weekly or monthly.



MING PAO DAILY NEWS  
www.mingpaotor.com



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# Online

- Canada has one of the highest usage rate in the world
  - 84% have daily access
  - 75% have access at home
  - 74% have high speed access
- Online is now the preferred media source for information

	Internet	Magazine	Newspaper	Radio	TV
Financial Information	37%	6%	8%	1%	4%
Health Information	52%	13%	2%	1%	6%
Product Reviews	52%	20%	5%	1%	5%
Family Information	26%	22%	3%	1%	3%
General News	25%	1%	17%	2%	52%

- Search engine optimization is a key way of looking up information
  - 20 – 25% of searches done on Google each day are new



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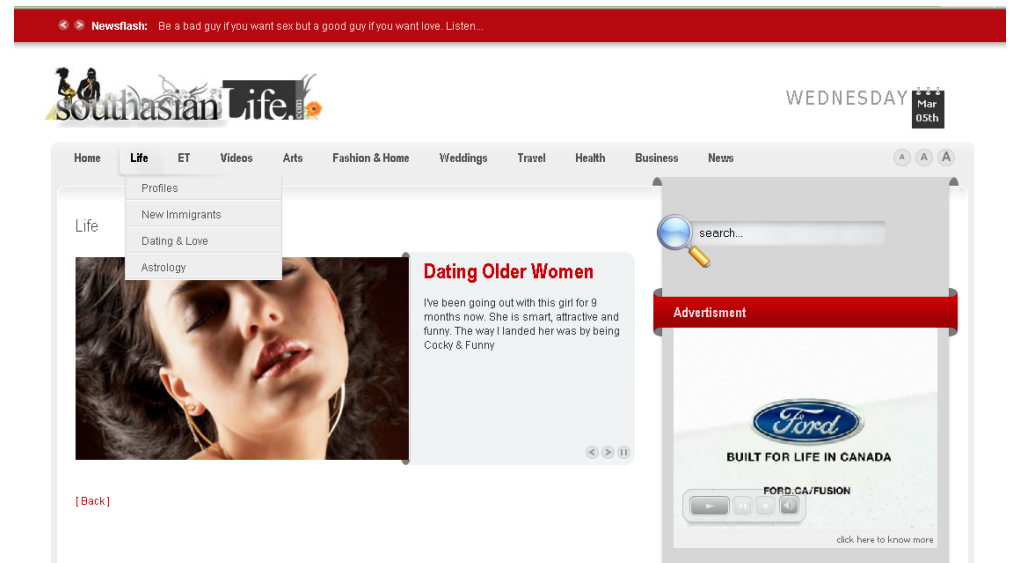
# Online

## Chinese

- Access sites both Canadian and from homeland

## South Asian

- Access site both Canadian and from homeland
- Key Canadian sites include:



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# Social Networking

- Many sites exist globally with varying leadership positions\*:
  - Facebook - Canada, U.K., South Africa and Norway
  - MySpace - U.S., Australia, Mexico and Italy
  - Orkut – India, Brazil and Paraguay
  - Friendster – Philippines, Singapore and Indonesia
  - Cyworld – South Korea
- Need to be aware of new immigrants connections to homeland social networking sites
- Entrepreneurial sites such as Linked-In or Facebook are attracting adults
  - 37% of online adults in the U.S. used internet social-networking tools at least once a month in 2007\*\*
  - Given high propensity of online usage among ethnic communities suggests networking sites to be attractive

\* thetyee.ca – Aug. 2007

\*\* Rick Spence at Financial Post – Feb. 2008



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# Word Of Mouth

- References matter
  - 92% of consumers cite 'word of mouth' as one of the best sources for info. about new products (up from 68% a generation ago) (Source: National Opinion Pole)
  - 80% of consumers trust recommendations from family, friends and 'influential persons' over all other forms of advertising (Source: National Opinion Pole)
  - 60% of consumers trust recommendations from on-line discussion groups (Source: Forrester)



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# Events

- Grassroots opportunities to connect face to face
- Demonstrates community support



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# Media Watch-Outs

- Audited vs. sworn distribution
  - Recognized 3<sup>rd</sup> party auditing organization
- Analysis of distribution by geography and place of distribution
- If bulk distribution are returns accounted for in circulation claims
- Paid versus free distribution
  - Paid distribution generates more readers
- Independent owners
- Sensitive to editorial content
- Ensure adaptation aligns with preferred language of media selected
- Solid rationale for media selection or rejection



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# Case Studies



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**Creating Opportunity**



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# Targeting International Health Professionals

## Original Creation

- concept testing
- execution
- communications planning



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# Geo-Targeting



HealthForceOntario  
Access Centre

We're opening doors to  
International Health Professionals.

The HealthForceOntario Access Centre helps internationally educated health professionals prepare for practice in Ontario. Knowledgeable advisors work one-on-one to review your experience, explain steps to qualification and assess your opportunities.

Register online at [HealthForceOntario.ca](http://HealthForceOntario.ca) or call us at 1 800 596-4046

Ontario  
HealthForceOntario Marketing and Recruitment Agency

HealthForceOntario  
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Ontario  
HealthForceOntario Marketing and Recruitment Agency

HealthForceOntario  
Access Centre

HealthForceOntario Access Centre ਨੇ, ਦੁਨੀਆਂ ਭਰ ਤੋਂ ਆਏ ਪੜ੍ਹੇ ਲਿਖੇ ਚੈਲੰਜ-ਪੇਸ਼ੇ ਵਾਸਤੇ ਦਰਵਾਜ਼ੇ ਖੋਲ੍ਹ ਦਿੱਤੇ ਹਨ, ਅਤੇ ਉਨ੍ਹਾਂ ਨੂੰ ਓਨਟਾਰੀਓ ਵਿੱਚ ਕੰਮ ਕਰਨ ਲਈ ਤਿਆਰ ਕਰਦੇ ਹਨ।

ਅਨੁਸ਼ਾਸਿਤ, ਨਾਮ ਦਰਜ ਕਰਨ ਲਈ ਵੈੱਬਸਾਈਟ [HealthForceOntario.ca](http://HealthForceOntario.ca) ਤੇ ਜਾਓ।  
ਜਾਂ 1-800-596-4046 ਤੇ ਫੋਨ ਕਰੋ।

Ontario  
HealthForceOntario Marketing and Recruitment Agency



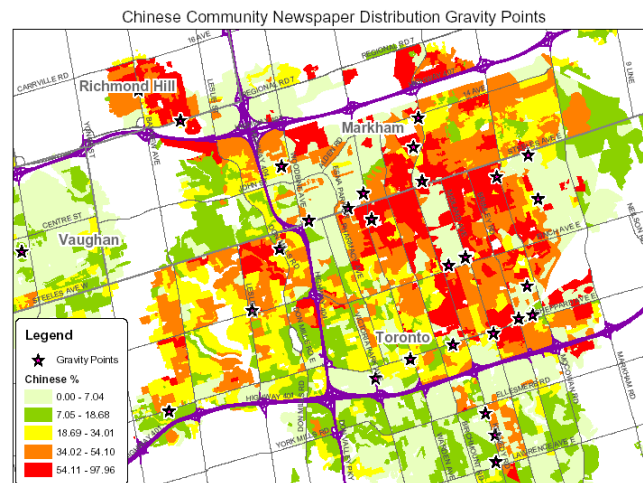
HealthForceOntario  
Access Centre

ਅਸੀਂ, ਦੁਨਿਆਂ ਭਰ ਤੋਂ ਆਏ ਪੜ੍ਹੇ ਲਿਖੇ ਚੈਲੰਜ-ਪੇਸ਼ੇ ਵਾਸਤੇ ਦਰਵਾਜ਼ੇ ਖੋਲ੍ਹ ਰਹੇ ਹਾਂ।

HealthForceOntario Access Centre ਗ੍ਰਹਿਣ ਕਰੋ ਅਤੇ ਅਸੀਂ ਅੱਪਣਾਵਾਂਗੇ। ਅਸੀਂ ਅੱਪਣਾਵਾਂਗੇ ਅਤੇ ਅਸੀਂ ਅੱਪਣਾਵਾਂਗੇ। ਅਸੀਂ ਅੱਪਣਾਵਾਂਗੇ ਅਤੇ ਅਸੀਂ ਅੱਪਣਾਵਾਂਗੇ।

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Ontario  
HealthForceOntario Marketing and Recruitment Agency



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# BANNER ADS, TELEVISION & RADIO



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# LANDING PAGE

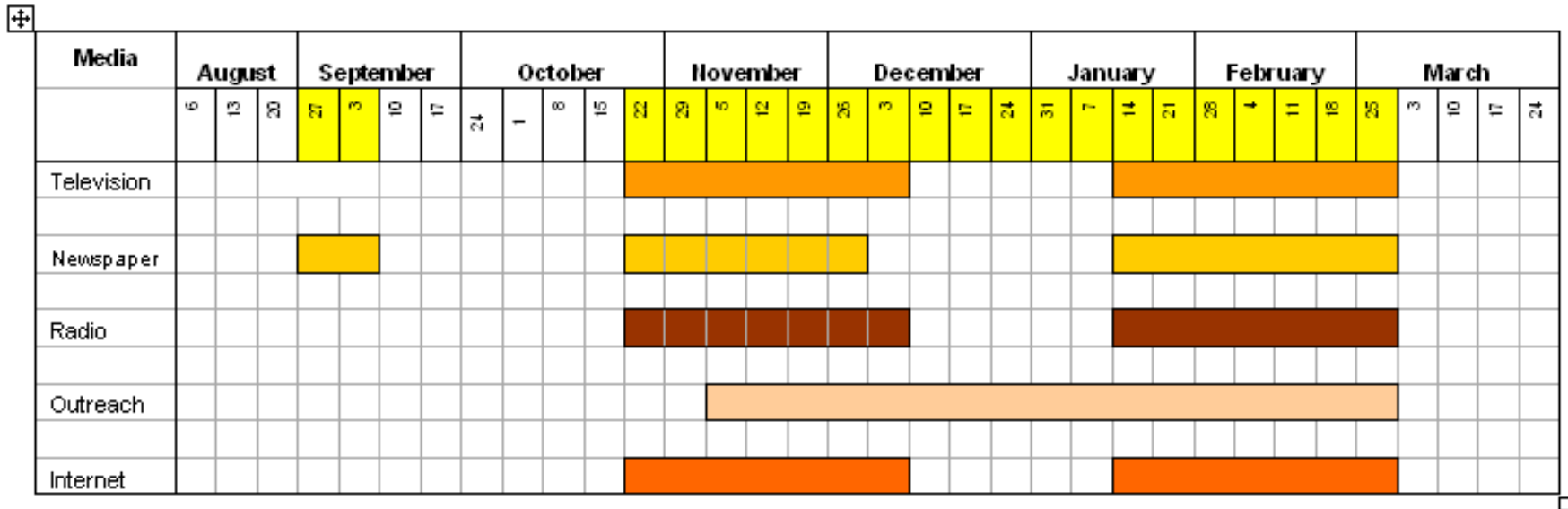


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# COMMUNICATIONS PLAN

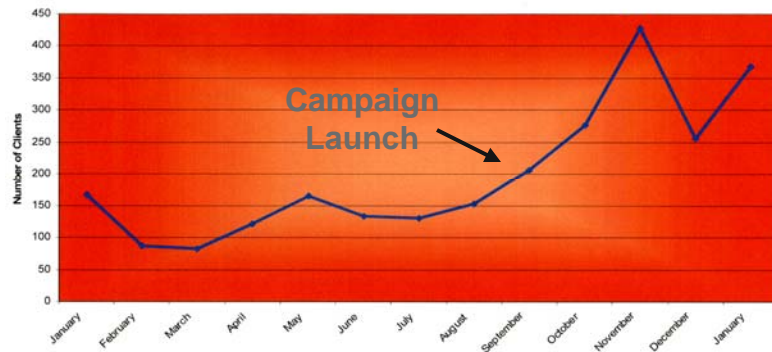


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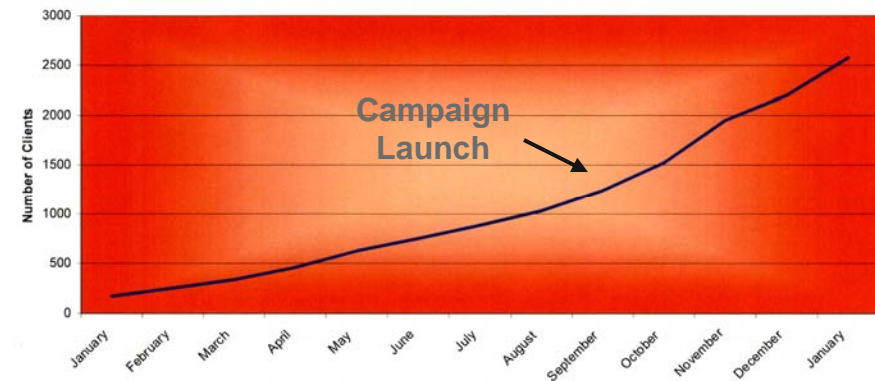


# Results

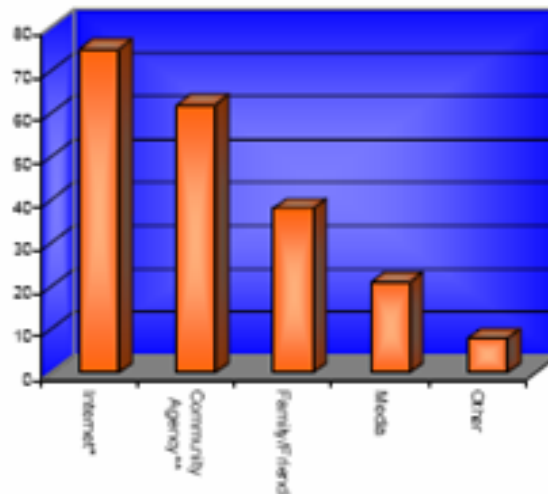
## Total New Clients by Month



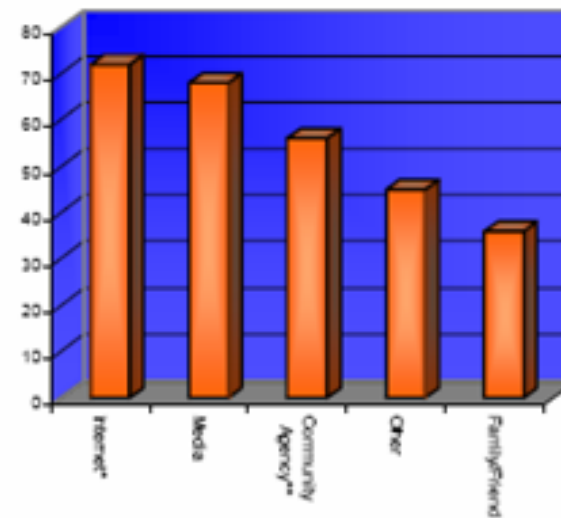
## Total Clients by Month



## September 2007



## October 2007



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# **Culturally Relevant Adaptations**

## **Original Cultural Recognition**



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# ROGERS – 'Transit Test'



**GET MORE OF WHAT YOU WANT. FOR LESS.**

Build a Rogers Bundle that's right for you and save.

<b>PERSONALTV™</b> <ul style="list-style-type: none"> <li>• Basic Digital – Over 170 channels in 100% digital picture and sound</li> <li>• Free access to On Demand programming</li> </ul>	<b>ALL THREE FOR \$99 /MONTH FOR THE FIRST 12 MONTHS*</b> <p>Includes free installation and monthly service fees</p>
<b>ROGERS HOME PHONE™</b> <ul style="list-style-type: none"> <li>• Basic + 1 – Choice of one Calling Feature</li> <li>• Free Long Distance calling across Canada to Rogers Wireless, Fido® or Rogers Home Phone customers†</li> </ul>	
<b>ROGERS™ YAHOO! HI-SPEED INTERNET</b> <ul style="list-style-type: none"> <li>• Express – Speeds of up to 7 Mbps</li> <li>• Includes Norton AntiVirus™ at no additional cost</li> </ul>	

Choose this Bundle or let us help you customize another Rogers Bundle.

Limited Time Offer!  
Call today 1 866-716-0269  
or visit [rogers.com/getmore](http://rogers.com/getmore)

**ROGERS**

\*Minimum 24-month term required for each eligible service. Special promotional offer of \$109/month in year two.



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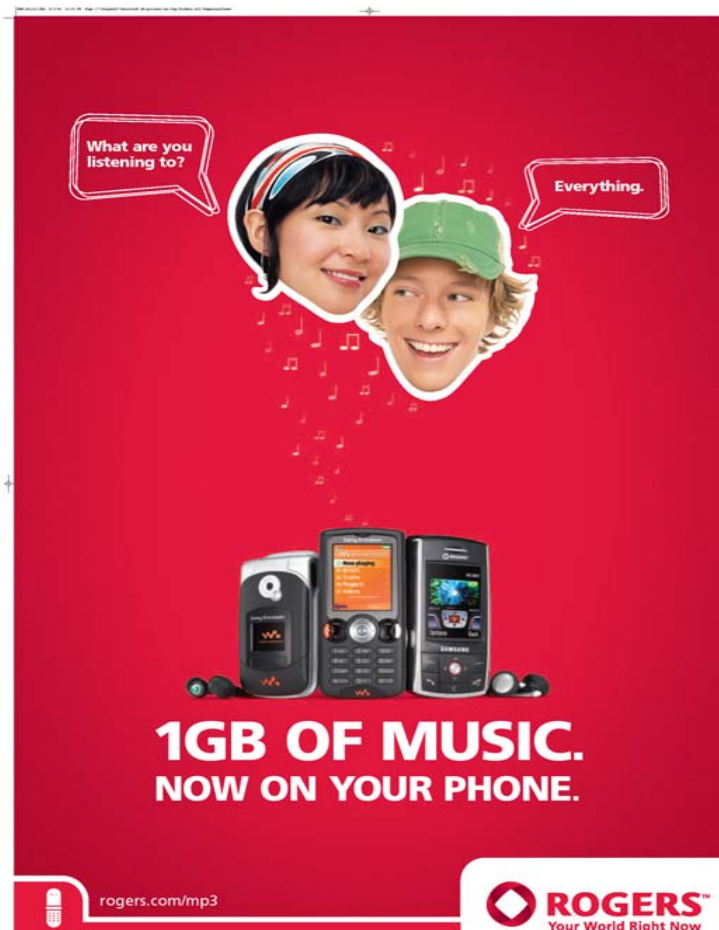
Using an ethnic family image in the Metro resulted in 50% increase in call volume



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# ROGERS – Promotion



What are you listening to?

Everything.

**1GB OF MUSIC.  
NOW ON YOUR PHONE.**

rogers.com/mp3

**ROGERS**  
Your World Right Now



Mere pass Gaadi hain,  
Bangle hain,  
tere pass kya hain?

Mere pass  
1GB MP3  
phone hai!

MP3 Phones  
starting from  
**\$29.99\***

**1GB OF MUSIC.  
NOW ON YOUR PHONE.**

Get everything you need to load & play. Free with select MP3 phones.  
Up to 1GB of Memory • Stereo Headset • USB Cable

CANADA'S CLEAREST WIRELESS NETWORK™

**ROGERS**  
Your World Right Now



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# ROGERS – Promotion

Where's your stop?

280 tracks away.

1GB OF MUSIC.  
NOW ON YOUR PHONE.

Includes everything you need to load & play.  
Up to 1GB of Memory • Stereo Headset • USB Cable

rogers.com/mp3

**ROGERS**  
Your World Right Now

Arrey ho Samba, Kitne gaane hain?

Pooro 280 Sardar!

rogers.com/mp3

**ROGERS**  
Your World Right Now

Where's your stop?

280 tracks away.

1GB OF MUSIC.  
NOW ON YOUR PHONE.

**ROGERS**  
Your World Right Now

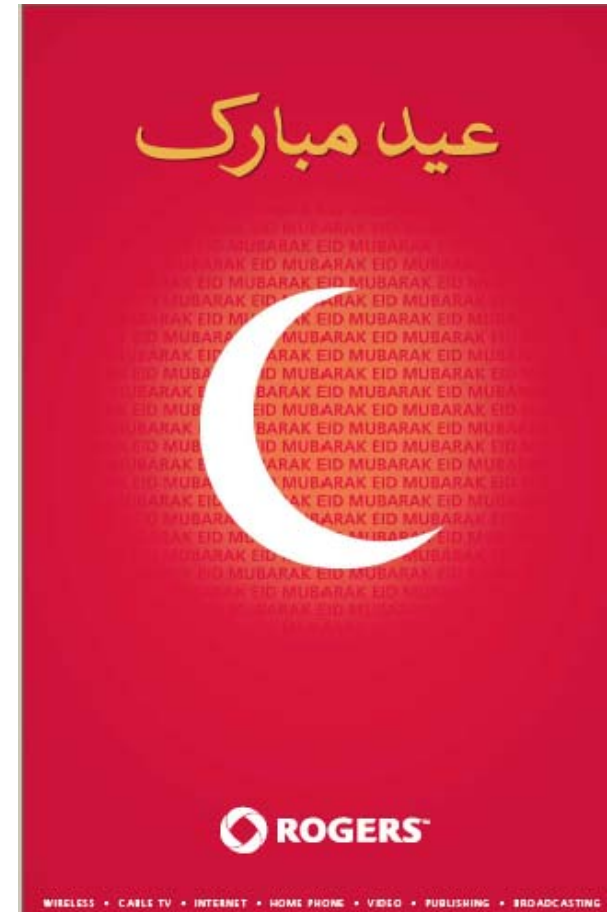


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# ROGERS – Festival Acknowledgement



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# Creative Best In Class

- Go beyond reflecting talent only
- Ensure copy adaptation reflects:
  - Appropriate language (eg. Brazilian Portuguese or Portugal Portuguese)
  - Appropriate font – e.g. Latin vs. Cyrillic
  - Cultural expressions - hinglish
- Original creative has opportunity to be culturally relevant



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*Dankie*

*Faleminderit*

*Thank you*

*Shukran*

*Grazie*

*Toda*

*Shenorhagal em*

*Webale*

*Mhuway su'*

*Efcharisto*

*Köszönöm*

*Dhanyawaad*

*Xie xie*

*Domo arigato*

*Dziekujemy*

*Merci*

*Miharbaanee*

*Jag tackar*

*Shukriya*

*Ngiyabonga*



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